

# PatientPortal

## Getting Started *For Patients*

### What is the Patient Portal?

Step 1 – [Activate your account](#)

Step 2 – [Log in to the platform](#)

Step 3 – [Complete your account information](#)

Step 4 – [Manage your health record](#)

Step 5 – [Check your messages](#)

Step 6 – [Schedule an appointment](#)

Appendix A – [How do family plans work?](#)

# What is the Patient Portal?

---

The Patient Portal helps healthcare providers communicate, document and interact with their patients in-person and online.

This technology frees providers to spend more time doing what they do best: care for patients. It's a better way of delivering care and doing business.

As a patient, there are multiple advantages to using the Patient Portal, which include accessing your medical record online, making appointments and communicating with your provider through secure messaging, live chat and videoconference.

Do not hesitate to contact your provider if you have questions about your account.

## Please keep in mind...

- **For emergencies, immediately call 911**
- For urgent medical matters, call your physician
- You can always communicate with your care provider by phone even if you have a Patient Portal account
- Contact the Patient Portal team if you need further assistance with using the platform: [info@portalconnect.net](mailto:info@portalconnect.net)

*Go to Step 1 – [Activate your account](#)*



***If you are already logged in to the platform but have not subscribed to a plan, skip to Step 2.3.***

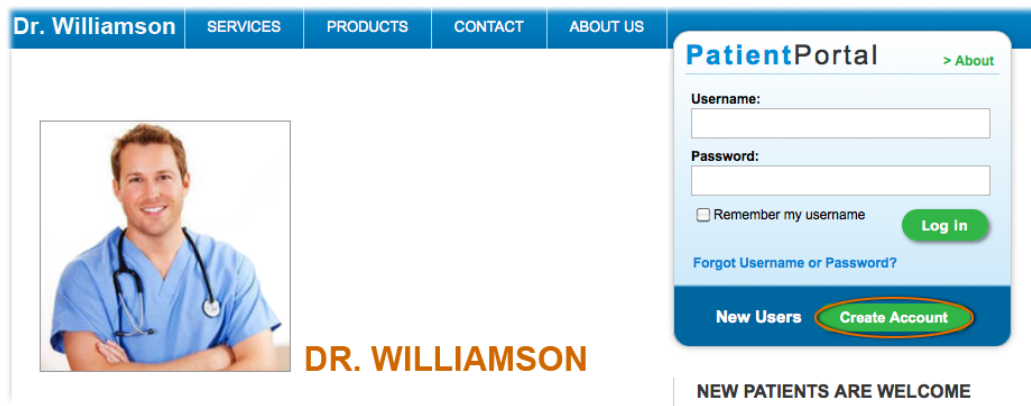
***If you have already subscribed to a plan, skip to step 2.6.***

# Step 1

## Activate your account

Welcome to the Patient Portal! Before you can log in to the platform, you must have a username and password. Follow the next steps to enable your account, using your activation key.

- 1.1 Go to your provider's website and click the *Create Account* link to complete the form.



The screenshot shows the Dr. Williamson Patient Portal interface. At the top is a navigation bar with links: Dr. Williamson, SERVICES, PRODUCTS, CONTACT, and ABOUT US. Below the navigation bar, on the left, is a photo of Dr. Williamson, a man in blue scrubs with a stethoscope, and the text "DR. WILLIAMSON" in orange. On the right is a "PatientPortal" login and registration form. The form includes fields for "Username:" and "Password:", a "Remember my username" checkbox, a "Log In" button, and a link for "Forgot Username or Password?". At the bottom of the form, there is a "New Users" section with a "Create Account" button, which is circled in red. Below the form, the text "NEW PATIENTS ARE WELCOME" is displayed.

- 1.2** Complete the secure form. All fields marked with an asterisk are mandatory. Enter the code your provider gave you in the *Activation Key* field. The information you enter will be updated to your existing account, as created by your provider.

! Your password must contain 6 to 12 characters, including at least 1 number and 1 letter.

**First Name:**  
 \*

**Last Name:**  
 \*

**Date of Birth:**  
   \*

**Gender:**  
 \*

**Activation Key:**  
 \*

**Email:**  
 \*

**Confirm Email:**  
 \*

**Password:**  
 \*

**Confirm Password:**  
 \*

**Secret Question:**  
 \*

**Secret Answer:**  
 \*

**Time Zone:**  
 \*

☒ I agree to the [Terms and Conditions](#)

**Submit**

Once you have filled out all fields, you must agree to the *Terms and Conditions* by selecting the *checkbox*.

Click the *Submit* button to activate your account.

*Continue to Step 2 – [Log in to the platform](#)*

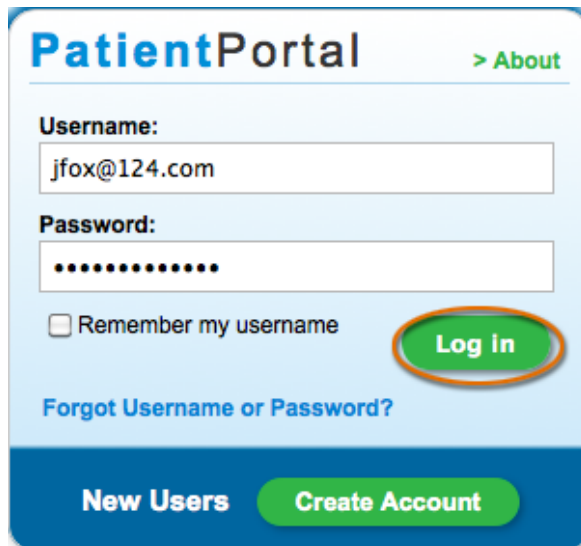
## Step 2

# Log in to the platform

---

- 2.1** To log in to your personal Patient Portal homepage, enter your username and password and click *Log in*.

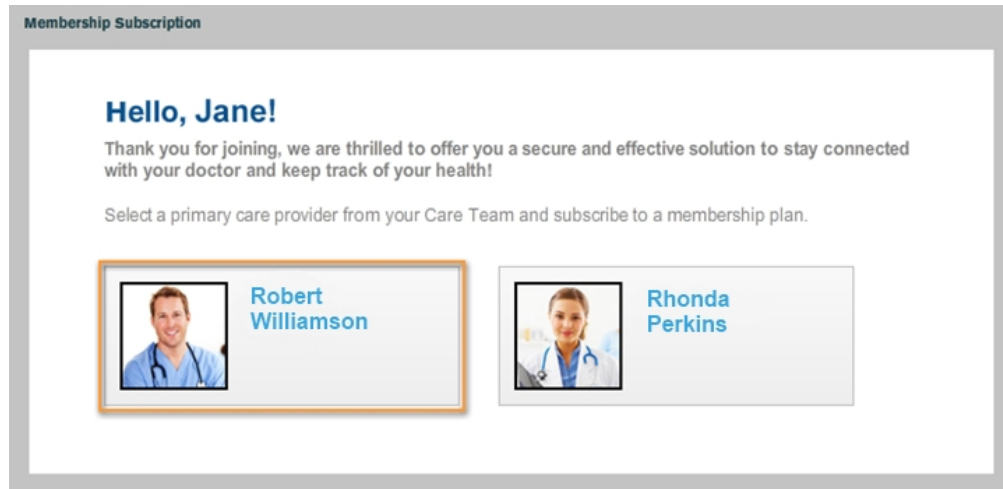
! When first logging in, the *Username* is the email address you have provided.

The image shows a screenshot of the Patient Portal login interface. At the top, the text "PatientPortal" is displayed in blue, with a green link "> About" to its right. Below this, there are two input fields: "Username:" with the text "jfox@124.com" and "Password:" with masked characters ".....". A checkbox labeled "Remember my username" is positioned below the password field. To the right of the checkbox is a green oval button with the text "Log in" in white. Below the "Log in" button is a blue link "Forgot Username or Password?". At the bottom of the form, there is a dark blue bar containing the text "New Users" and a green button with the text "Create Account".




! You are redirected to your Patient Portal homepage.

**2.2** When you first log in, some of the following screens will appear depending on the information the provider entered in the account creation process.

If you are not already subscribed to a membership plan and if there is more than one provider on your care team, you must first *select the provider* with whom you want to subscribe to a plan.




**2.3** Once you have selected your provider or if there is only one provider on your care team, the *Membership Subscription* screen appears:

- Click a *plan* to view its details and select it;
  -  If your provider offers a family plan (  ) and some of your family members are also patients of this provider, you may want to take advantage of such a membership. Go to [Appendix A – How do family plans work?](#) to learn more about family plans.
  - Read the *Terms and Conditions* and then select the *checkbox*;
  - Click the *Subscribe* button.
-  Though some features of the Patient Portal are available at no cost (such as receiving messages from your provider and viewing appointments), access to others may not be available if you have not subscribed to a membership plan.


**Membership Subscription**

**Now select your membership plan type**






Click to preview and select a plan from Dr. Robert Williamson's list. Accept the terms and conditions and then click "Subscribe".



**Robert Williamson**

▼ **12 Month Subscription Plan** 




<b>Subscription Fee</b> 12-month membership	<b>\$17.50 /month</b>
--	-----------------------

On-demand services:	Fees
 House call	\$300.00
 Office visit	\$0.00
 Phone visit	\$50.00
 Video visit	\$60.00
 Messages	\$10.00

Great for those desiring ongoing medical care and services. Included free internet access to medical records and online scheduling. Requires a 1 year commitment and monthly service fee. Includes only physician consultative services and does not include lab testing, medication, or any other outpatient or inpatient service.

► **Pay As You Go Plan**

☒ I have read and accept the [Terms and Conditions](#)

- 2.4** If your provider has not already entered your payment information or if the plan you are subscribing to includes fees, the *Card Information* screen appears.

Complete the form and then click *Confirm*.

**Card Information**

### You're almost there!

You have selected the "12 Month Subscription Plan" with Dr. Robert Williamson. \$17.50 will be charged each month to your card (credit, debit or HSA) provided below. Upon credit authorization, your membership will be activated. Please complete the following:

First Name \*

Last Name \*

Card Type \*

American Express

▼

Card Number

424242XXXXXX4242

New Card Number \*

CVN \*







Card Expiration Date \*

03

▼

2015

▼



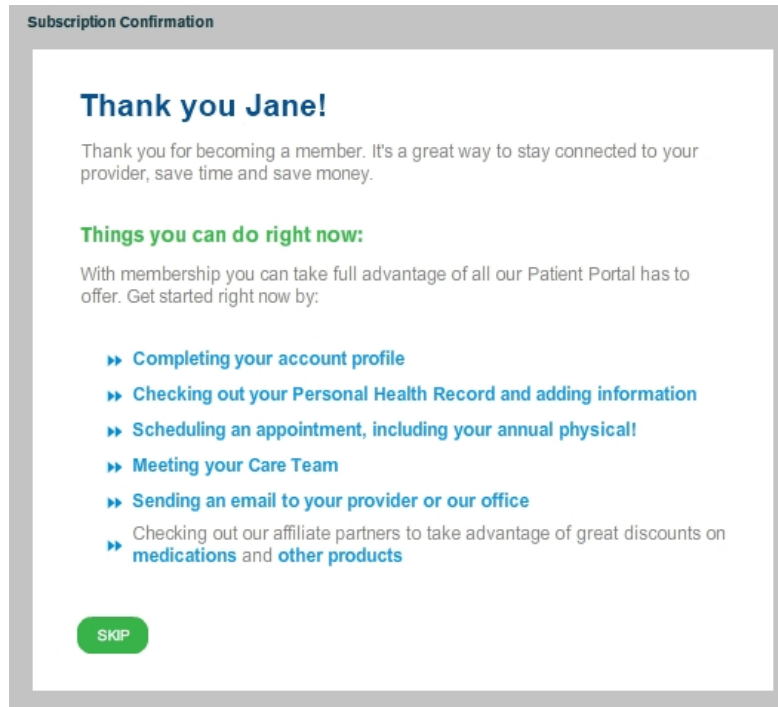
The subscription fee is non-transferable and non-refundable after 7 days, once subscribed. 12 Month Subscription Plan fee may not be billed to private or federal insurance plans, since it is not medical care.

BACK

CONFIRM

HELP

- 2.5** Once your subscription is completed, you can follow *the instructions* of the *Confirmation* screen or click the *Skip* button to enter your Patient Portal homepage.



**2.6** On your Patient Portal homepage, follow the tips displayed onscreen:

- Send a secure message or contact your provider
- Schedule an appointment
- Manage your Personal Health Record (PHR)

### **Welcome back, Jane!**

You can save time, save money, and live well! From anywhere at any time:

- ▶▶ Send a [secure message](#) or contact your [provider](#)
- ▶▶ Schedule an [appointment](#)
- ▶▶ Manage your [Personal Health Record](#)
- ▶▶ Check out our affiliate partners to take advantage of great discounts on [medications](#) and [other products](#)

*Continue to Step 3 – [Complete your account information](#)*

## Step 3

# Complete your account information

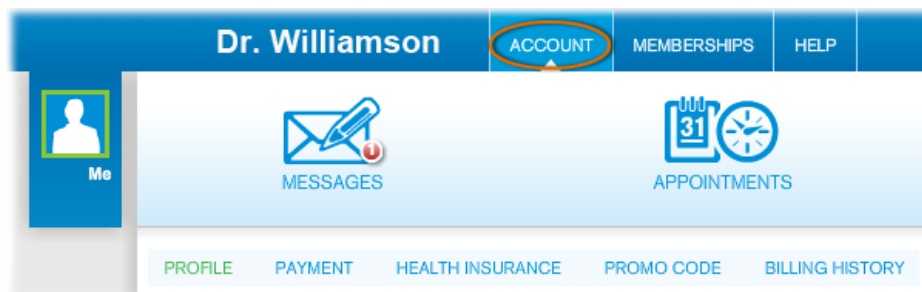
---

Your Patient Portal account is the section where you can complete your contact information, as well as data on payment, and your health insurance.

Your provider, who created your account, already entered part of your profile information in the process.

! Please take the time to review and complete your profile.

**3.1** Click *Account* at the top of the screen.



### 3.2 In the *Profile* section, you can view and edit your personal profile information.

⚠ Please take the time to validate the information that is currently displayed in this page.

The screenshot shows the 'PROFILE' tab selected in a navigation bar. Below the navigation bar, there is a profile picture placeholder with a 'Change Photo' link (callout 1). To the right, the 'Basic Information' section contains fields for First Name (Jane), Last Name (Fox), Date of Birth (1978, February, 24), Gender (Female), Time Zone (GMT-08:00 Pacific Time), Ethnicity, Race, and Preferred Language. Below this is the 'Account Settings' section, which includes Activation Key (Z1Z-1ZZ-11ZZ), Activation date (Wednesday, Jun. 30, 2010 at 11:09 AM), Username (jfox@124.com), Password (Change Password?), Secret Question (Where did you meet your significant other?), and Secret Answer (dehedeleh4642). A 'SAVE' button is located at the bottom right (callout 3).

- 1- Click the *Change Photo* link to upload your picture to your profile;
- 2- Review the data entered by your provider (if applicable) and complete all required information. Required fields are represented by an *asterisk*;
- 3- Click *Save* when you have finished completing your profile.

Continue to Step 4 – *Manage your health record*

## Step 4

# Manage your health record

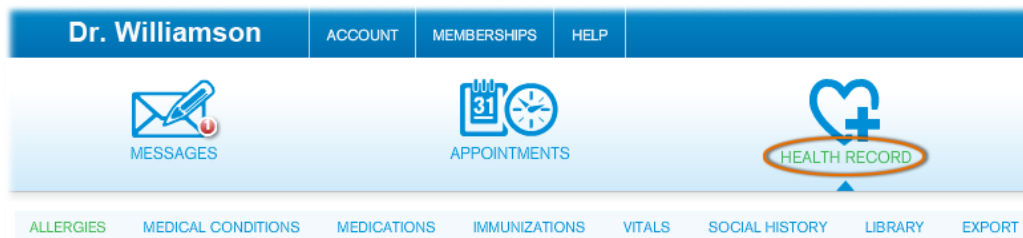
---

In your health record, you can enter/view information regarding medical conditions and medications. You can also share documents with your provider in the *Library* section.

If your provider created your account, he or she may already have entered information in your health record.

ⓘ Please take the time to review and complete your health record. Access to your health record may not be available if you have not subscribed to a membership plan.

**4.1** Click *Health Record* at the top of the screen.

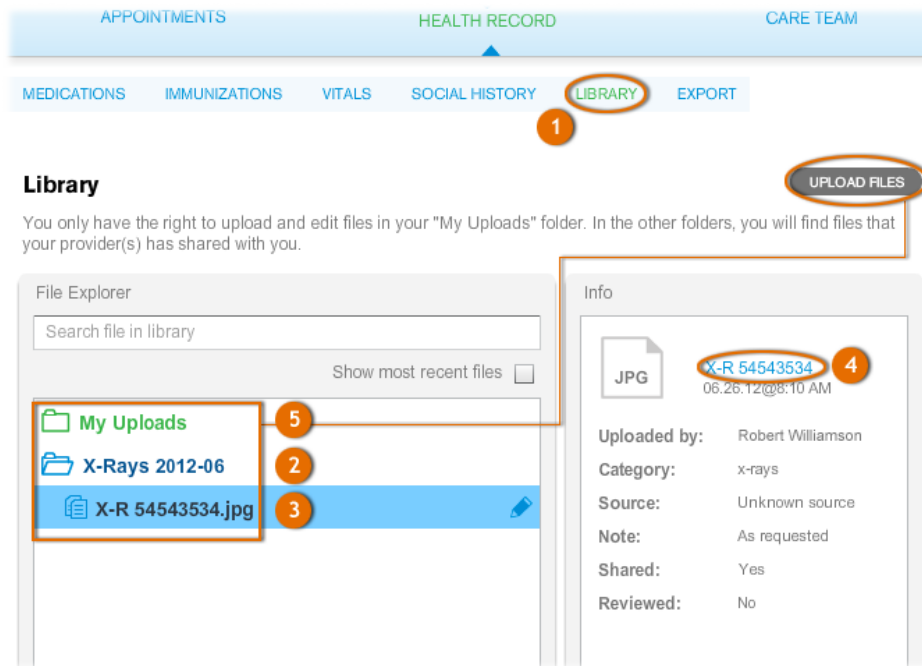


## 4.2 In your health record, you can view and/or edit medical information such as allergies, medical conditions, medications, immunizations, labs, vitals and social history.

! Please take the time to validate the information that is currently displayed in all sections of your health record.

- 1- You can follow the *tips* to complete your health record;
- 2- In the *Allergies* section, enter and edit your allergies. You can indicate whether or not each allergy is still active;
- 3- In the *Medical Conditions* section, enter and edit your past and present medical problems, as well as the procedures you have had. You can update your family tree in the *Family History* area at the bottom of this section;
- 4- In the *Medications* section, enter and edit your past and present medications. Also, you can specify alternative medications and therapies;
- 5- In the *Immunizations* section, enter and edit your vaccines;
- 6- In the *Labs* section, you can review your lab results;
- 7- In the *Social History* section, enter and edit all types of habits that apply to your lifestyle.

### 4.3 In your health record, you can also view documents that your provider has shared with you.



- 1- Click the **Library** menu to display the section that contains your documents;
- 2- **Folders** that your provider shares with you are displayed in blue. Click a folder to view its content. You cannot edit files that have been uploaded by your provider;
- 3- Click a **file** to display its details in the **Info** section to the right;
- 4- Click the **file's title** in the **Info** section to open it in the **Library's** document viewer;
- 5- All files that you upload to your library yourself are placed in the **My Uploads** folder. You can only edit files that are located in this folder.

Continue to Step 5 – [Check your messages](#)

## Step 5

# Check your messages

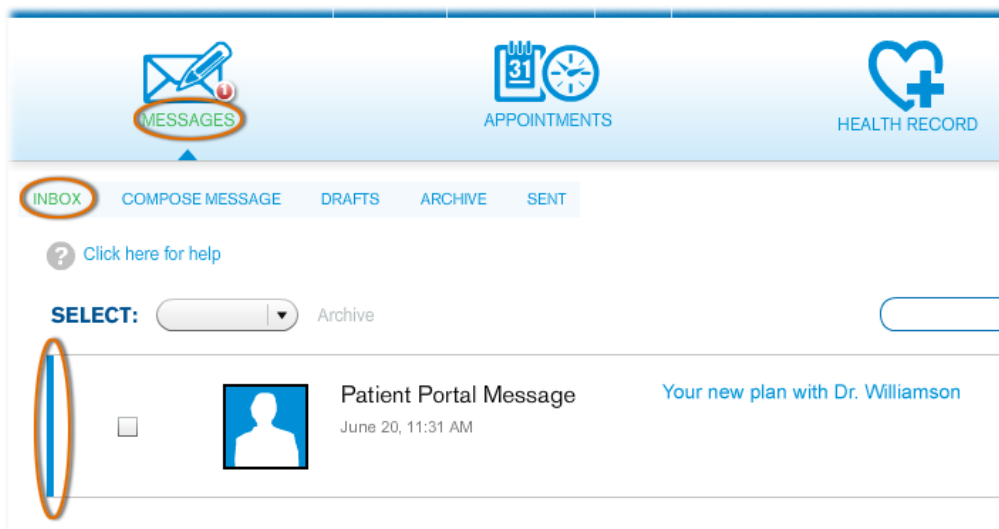
The Patient Portal offers a secure message section where you receive messages from the system and your provider. Using this tool, you can communicate with your provider efficiently and securely.

! Patient Portal Messages include confirmations when you subscribe to your provider's membership plans.

### 5.1 Messages you receive from your provider are in your *Inbox*, in the *Messages* menu.

You can see that you have unread messages directly on the *Messages* menu [ 1 ] and, in your *Inbox*, by the *blue bar* to the left of the message.

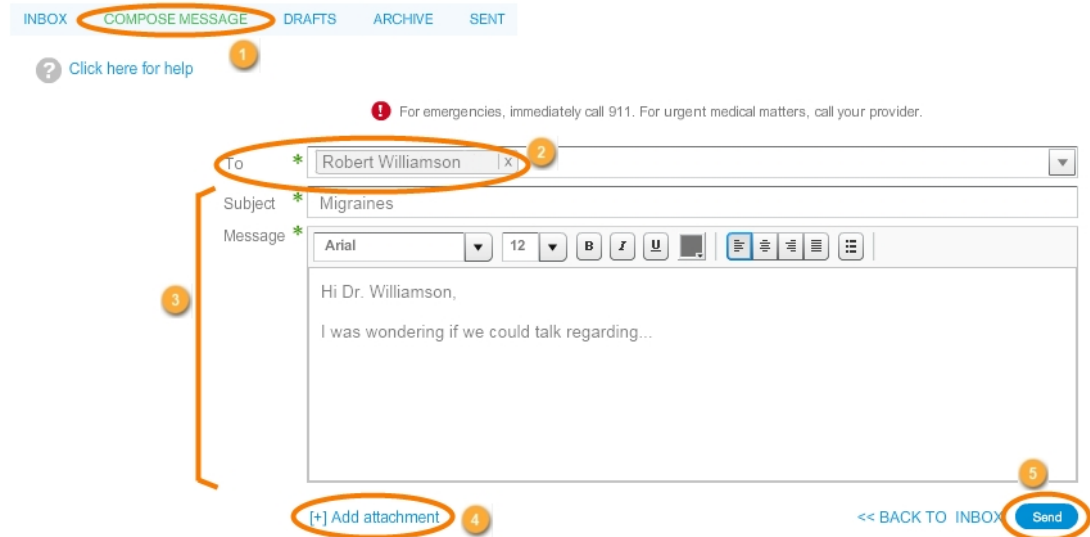
Click in the row of a message to read its contents.



## Send a secure message to your provider

**5.2** After you have subscribed to your provider's membership plan and updated your account and health record information, you may want to communicate with him/her using our secure message system.

 Please remember that you should always dial 9-1-1 in case of emergency.



The screenshot shows the 'COMPOSE MESSAGE' interface. At the top, there are tabs: INBOX, COMPOSE MESSAGE (highlighted with a green circle and labeled 1), DRAFTS, ARCHIVE, and SENT. Below the tabs is a link: '? Click here for help'. A warning message states: 'For emergencies, immediately call 911. For urgent medical matters, call your provider.' The form fields are: 'To' (labeled 2) with a dropdown menu showing 'Robert Williamson'; 'Subject' (labeled 3) with the text 'Migraines'; and 'Message' (labeled 3) with a text area containing 'Hi Dr. Williamson, I was wondering if we could talk regarding...'. Below the message field is a toolbar with icons for text formatting and attachments. At the bottom, there is a link '[+] Add attachment' (labeled 4) and a 'Send' button (labeled 5).

- 1- Click the *Compose Message* link;
- 2- In the *To* field, type the first letters of your provider's name and select him/her in the menu that appears;
- 3- Enter your *Subject* and *Message*;
- 4- You can append a document to your message by clicking *Add attachment* and then choosing a file from either your computer or your Patient Portal library;
- 5- Click *Send* to transmit the message to your provider.

Continue to Step 6 – [Schedule an appointment](#)

## Step 6

# Schedule an appointment

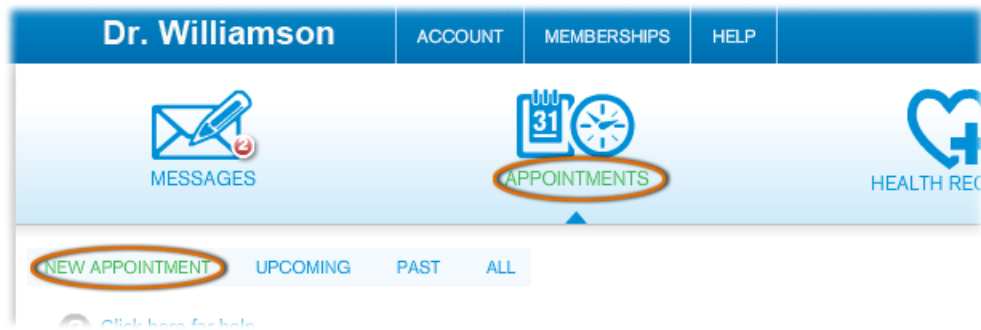
---

By now, you should have completed the following steps:

- You have subscribed to your provider's membership plan;
- You have reviewed and completed your account information;
- You have reviewed and completed your health record;
- You know how to communicate with your provider using our secure message service;

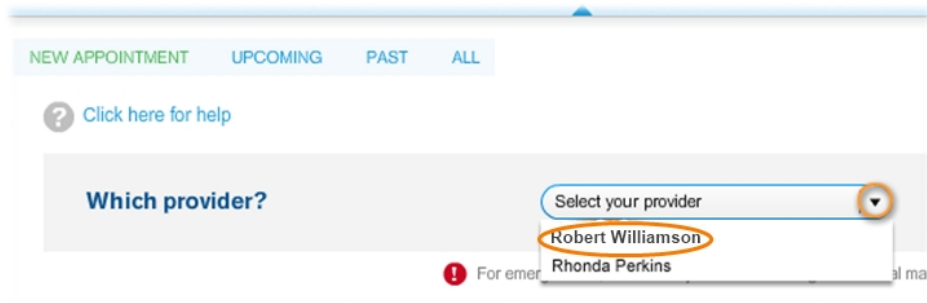
You are ready to schedule an appointment with your provider.

- 6.1** Click the *Appointments* menu. The *New Appointment* section is displayed by default.

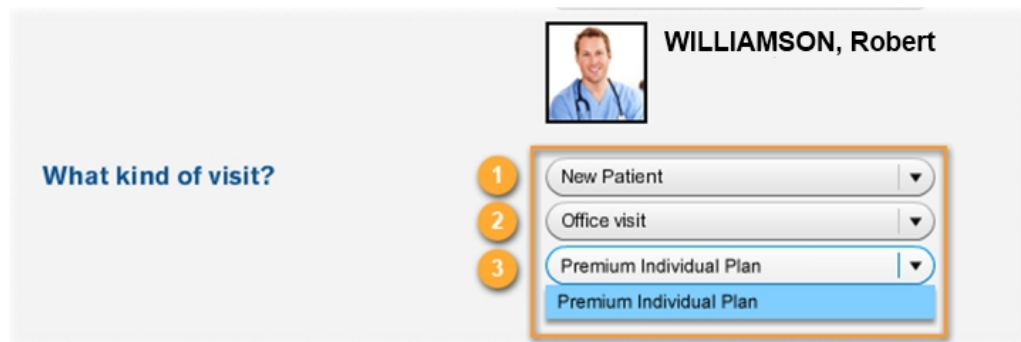


**6.2** Click the **arrow button** on the *Which provider?* menu to display the list of providers who are part of your team. Select a **provider**.

! If you are the owner of a **family plan**, a *Who is it for?* menu will precede the *Which provider?* menu, so you can select the participant for whom you are booking the appointment.



**6.3** Next, you have to select the options of the *What kind of visit?* section.



1- Select an **appointment category** (if applicable);

2- Select an **appointment type**;

3- Select your **membership plan**.

! Some options might be selected by default in these menus and the appointment category menu might not be displayed, depending on your provider's appointment settings and the number of plans you are subscribed to.

**6.4** To schedule an appointment based on the visit type you have selected, in the *When?* section:

**When?**

1- Find next available appointment

2- Wed Jul 13

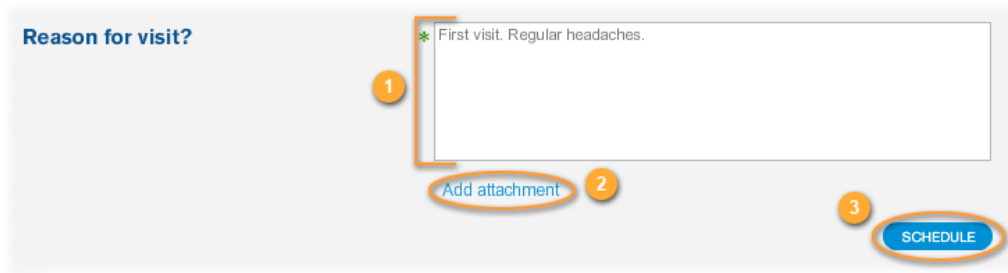
3- 10:30

4- You chose:  
Wednesday,  
July 13,  
10:30-11:15 AM (45 minutes)

R. Williamson, MD  
455 E. 23rd St., Suite 222  
Fox River, New York 10001

- 1- Click the *Find next available appointment* link to select the closest appointment based on your provider's availabilities;
- 2- You can also choose your *appointment date* by clicking a day on the calendar. You will not be allowed to select dates on which your provider is unavailable;
  - ! Available dates are represented in blue. Unavailable dates are dimmed.
- 3- Select the *time* of your appointment if you have not already selected it by clicking *Find next available appointment*;
- 4- The *date and time* you have selected for your appointment appear below your selection.

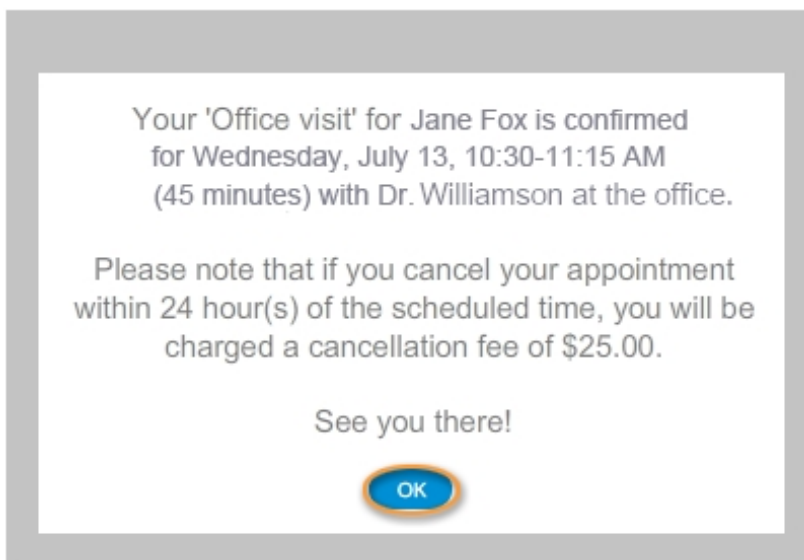
### 6.5 To finalize the booking of your appointment:



- 1- Enter the reason for your appointment request in the *Reason for visit?* box;
- 2- Click *Add attachment* to append a file to your request (optional);
- 3- Click the *Schedule* button to submit your appointment request.

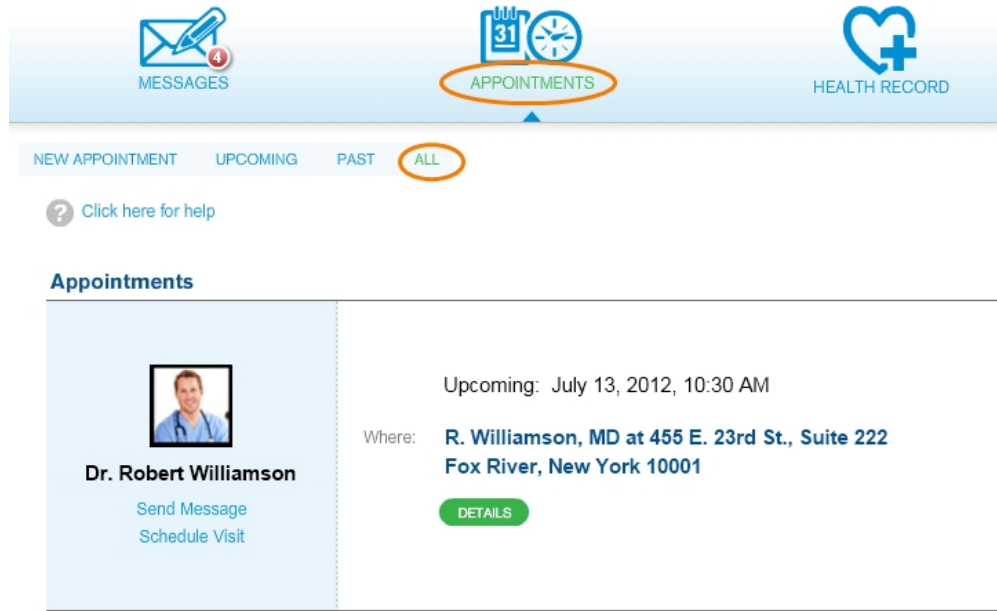
! Some providers charge a fee for certain types of appointments on the Patient Portal. If you have scheduled a visit type for which there is a fee, a screen will appear to explain the pre-authorization process. Also, if you have not yet provided your card information (credit, debit or HSA) at this stage, a *Payment Information* screen will appear for you to enter that information.

### 6.6 After clicking *Schedule*, a detailed appointment confirmation appears. Click *OK* to close this screen.



! You are redirected to your Patient Portal homepage where you can review your appointments.

**6.7** You can view all your appointments by clicking the *All* section in the *Appointments* menu.



Continue to 'Appendix A - *How do family plans work?*' to learn more about family subscription plans and the addition of participants.

## Appendix A

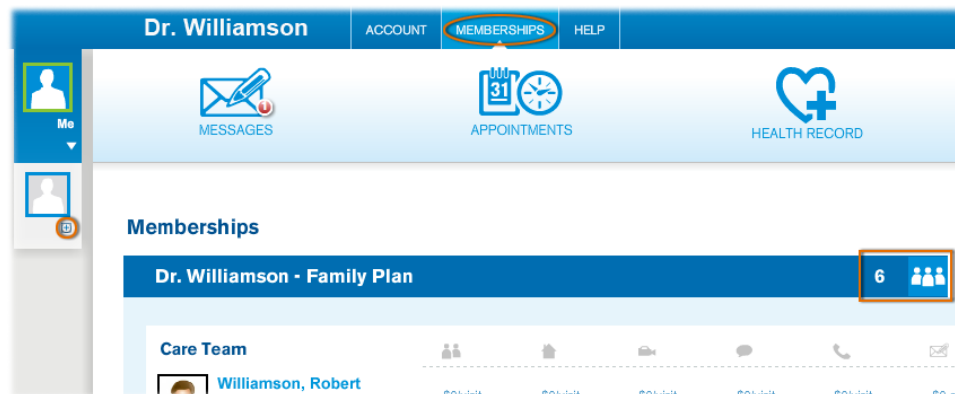
# How do family plans work?

When you subscribe to a family plan, you have the option to add participants, usually family members, to your membership. Adding these participants and taking ownership of their account make it possible for you to manage their health record and appointments all from your own patient portal. Family plan subscription fees are always charged to the owner of the plan.

### Add a participant to your family plan

When you are subscribed to a family plan, you can add a participant who already has an account on the Patient Portal.

- Click the **plus sign** on the carousel to add an existing patient as your participant. You are directed to the **Memberships** section. Your family plan is represented by a **multi-user** icon. The **number of participants** (including you, the owner) allowed for this plan is indicated next to the plan icon:



- In the **Participants** section of your family plan, click the **Add** button:

The screenshot shows the 'Participants' section of a family plan. On the left, under 'Plan Owner', it says 'FOX, Jane' with a note: 'All fees will be charged to this membership plan owner'. On the right, under 'Participants', there is a message: 'Take advantage of your membership. You do not have any participants in your family plan yet'. Below this message are two options: 'Create a new Hello Health member' with a 'CREATE NEW' button, and 'Add an existing Hello Health member with activation key' with an 'ADD' button. The 'ADD' button is circled in orange.

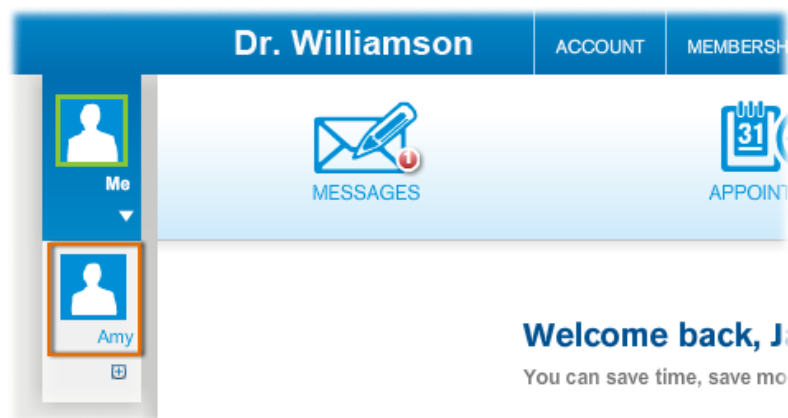
- Complete the form that is displayed. You must enter the participant's **Activation Key** as a security measure, to validate that you are entering the correct patient info. Click the **Add** button to add the participant to your family plan:

The screenshot shows the 'Add Existing Participant' form. It contains the following fields: 'First Name' (Lucy), 'Last Name' (Foster), 'Gender' (Female), 'Date of Birth' (2003, February, 3), 'Relationship' (Child), 'Time Zone' ((GMT-08:00) Pacific Time), and 'Activation Key' (three empty boxes). The 'Activation Key' field is circled in orange. At the bottom, there are 'ADD' and 'CANCEL' buttons. The 'ADD' button is circled in orange.

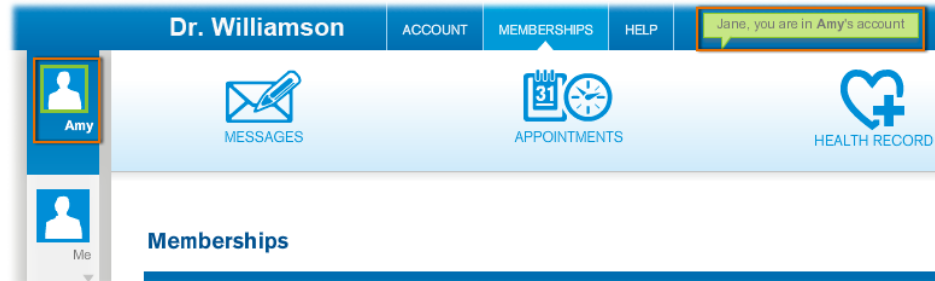
## Delegate management

Parents/legal guardians who add participants to their family plan are granted automatic delegate access (shared account) to the participant account if the participant is a minor between the ages of 0 and 11. That way, parents are able to access their children's health information and manage their accounts.

- ❗ Only the provider or the provider's staff can authorize delegate access to plan owners for participants who are 12 years or older.
- When a participant is delegated to you, he/she is added to your *carousel*, so you can perform account and health record modifications for this person, schedule appointments for him/her, exchange with their provider, etc.



- Click the participant's name to manage his/her account. The participant's *avatar* is now positioned on top of the carousel, indicating that you are in his/her account. You can also see a *green balloon* at the top of the screen to that effect:

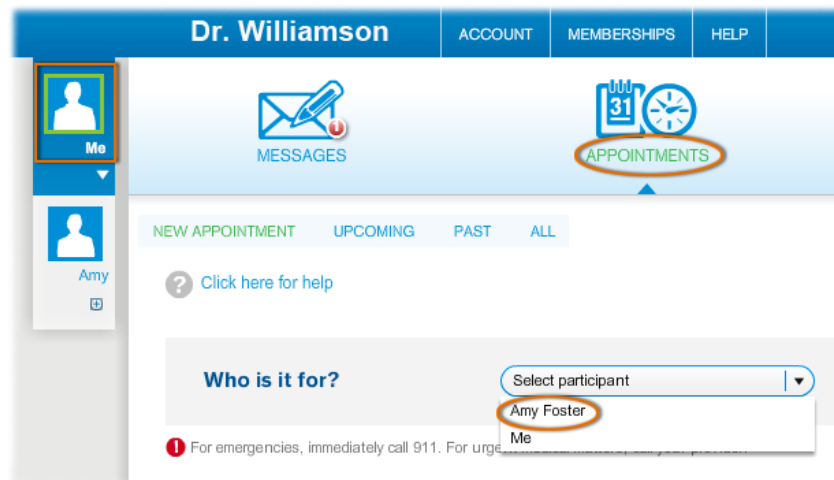


- Once your participant is selected in the carousel, you can edit the account information, access the health record, exchange secure messages, book appointments and perform other actions on his/her behalf;
- A participant on your family plan is still able to activate his/her account using the activation key and can then log in to the Patient Portal. Once a participant chooses to activate his/her account, the delegate role is removed from the family plan owner. You can then no longer manage his/her account through the carousel.

## Schedule an appointment for your participant

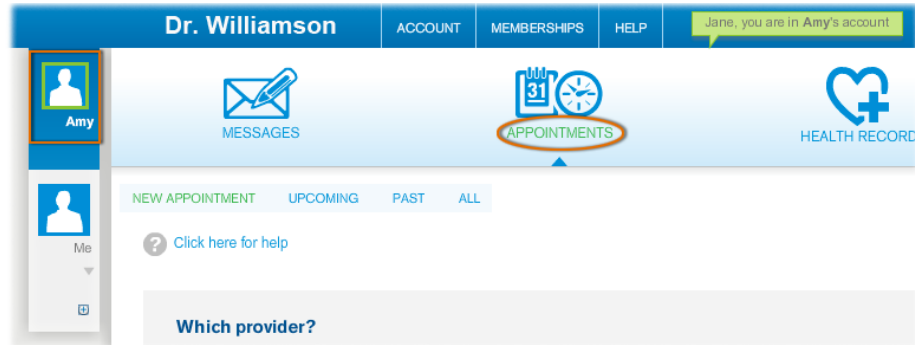
There are two different ways to proceed when you want to book an appointment for one of your family plan participants for whom you have delegate access. Either way you schedule them, all appointment fees (if applicable) are charged to your account, as the owner.

- 1- First, you can choose to book an appointment for one of your participants by going through the regular process:
  - Select *yourself* in the carousel (selected by default);
  - In the *Appointments* section, in the *Who is it for?* menu, select the *participant* for whom you want to schedule the appointment.



Then, enter the rest of the information to book the appointment for your participant.

- 2- The second option is to select the participant for whom you want to schedule the visit before clicking the *Appointments* section:
- Select *your participant* in the carousel;
  - In the *Appointments* section, schedule the appointment by entering the info as you would if you were making an appointment for yourself.



Please contact [info@portalconnect.net](mailto:info@portalconnect.net) for any questions you may have about the Patient Portal.